



# Directory of SUPERANNUATION RELATED STATISTICS





# **Directory of Superannuation Related Statistics**

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**Canberra Australia**

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## Preface

With the burgeoning interest in superannuation related matters in the past decade, there has been a corresponding growth in demand for superannuation related statistics. The diversity of sources of these statistics has made it difficult for users to find statistics of particular interest.

This directory contains details and descriptions of superannuation related statistics available from both private and public sector organisations and is intended to assist those interested in the subject of superannuation to locate relevant statistical information.

While every reasonable effort has been made to ensure the contents of the Directory are reliable, the Australian Bureau of Statistics accepts no responsibility for the accuracy of contributions from other organisations.

Although the Directory is intended to achieve as complete a coverage as possible, it is likely that there are additional data sources which have not been included. These could be included in later editions. If you are aware of any such sources, or wish to comment on any other aspect of this publication, please contact Ms Margaret Lee on (06) 252 7757.

I would like to thank the many organisations which took the time to complete their entries for this directory. I also wish to thank Margaret Lee from the Private Finance Section of the ABS for her efforts in the preparation of this publication.

**IAN CASTLES**  
Australian Statistician

Australian Bureau of Statistics  
Canberra, ACT 2616

October 1991

## HOW TO USE THIS DIRECTORY

You can locate an entry in three ways, by name of the contributing organisation, by name of a particular publication or, as is more commonly required, by subject.

Contributors to the Directory are listed alphabetically by organisation name in Part A, the Contributor Index.

There is a Publication Index in Part C which lists all publications mentioned in the Directory entries, in alphabetical order of publication name.

As well, there is a subject index in Part D which brings together all entries on a similar topic (e.g. membership of retirement funds, schemes etc).

The entries themselves are located in Part B, in alphabetical order of contributing organisation. The Directory uses a common set of headings to present the information about each statistical source. A guide to the contents applicable to each heading used in Directory entries appears below.

### **Name of Organisation**

Gives the name, address and main switch telephone number of the disseminating organisation.

### **Contact**

#### *About these statistics*

Gives the name and position of the person in the organisation to contact for further information about the statistics, name of the section or subsection in which the contact person is located (if applicable) and the contact telephone number (if a direct line is available).

#### *To purchase statistics*

If the point of sale is different from the contact person for further information, a contact is noted here (e.g. bookshop, publicity department) and the contact telephone number (if a direct line is available).

### **Dissemination Media**

Provides details of the forms in which the published statistics are available (e.g. publication, microfiche, magnetic tape, computer printout, floppy disk) and the cost of obtaining the data in these forms. Note that all prices quoted are subject to change without notice and therefore should be used as a general guide only. If prices are determined

on an individual request basis, "price on application" is recorded here. All prices quoted are per copy unless specified otherwise.

**Broad Description**

Offers a brief description of the contents of the statistics.

**Purpose of Data**

Outlines the reason why the statistics are compiled and what they are used for.

**Detailed Description**

***Population***

Gives population units (e.g. funds, persons, households) covered by the survey.

***Superannuation Data Items***

Describes in detail the information to be found in the statistics, generally including the units in which data are recorded (e.g. million dollars, number of fund members etc.), names of major groups of items, classifications used and cross-classifications available.

Some contributors have included a one sentence sample of recent information as an example of what can be drawn out of the statistics offered by them.

**Source**

Discloses whether the data are collected directly by the organisation and the extent of reliance on data from other sources, if any.

**Method of Collection**

This category is intended to give relevant information about the collection methodology, e.g. method of data collection, proportion of market covered, reliability, sample size.

If the data are an administrative by-product, that fact will be noted here.

**Frequency**

Provides the periods for which the data are available, e.g. quarterly, monthly, annually or irregularly.

**Timeliness**

Indicates how long after the reference period, the statistics become available and/or are published.

**Historical Data**

Reveals the period from which past data (time series) are available.

**Geographic Breakdown**

Provides details of geographic area covered by the collection (e.g. Australia, states, territories, capital cities, statistical divisions, statistical local areas, local government areas).

**Level of Confidentiality/  
Availability**

Outlines any restrictions placed upon access to the data. Note: this category does not relate to copyright. It relates to whether any data which are collected cannot be released from the collecting organisation. For example, the Census & Statistics Act requires that statistics not be published by ABS where it is possible for a third party to identify data supplied by a particular person or organisation. Confidentiality provisions also place restrictions on release of unpublished information.

**Unpublished Information**

Gives an indication of whether information beyond that described in the entry can be made available on request (subject to any confidentiality restrictions).



**Part A Contributor Index**

## Contributor Index

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## **Part B Directory Entries**

Level of  
Confidentiality/  
Availability

Case by case.

Unpublished  
Information

On application.

<b>Name of Organisation</b>	Australian Bureau of Statistics Cameron Offices, Chandler Street, Belconnen ACT 2616.  Telephone: (06)252 7911 Fax: (06)251 6009
<b>Contact</b> <i>About these statistics</i>	Mr Derick Cullen, Director Flow of Funds Section (W6Gb), PO Box 10, Belconnen ACT 2616.  Telephone: (06)252 6244 Fax: (06)252 5380
<b>To purchase statistics</b>	<ul style="list-style-type: none"> <li>• as a publication refer to order form on page 89.</li> <li>• <i>see also</i> Unpublished Information.</li> </ul>
<b>Dissemination Media</b>	Publication: <i>Australian National Accounts - Flow of Funds</i> (Cat. No. 5232.0) (Price on application).
<b>Broad Description</b>	Quarterly estimates of flows of finance between the Life and Superannuation sector and other sectors; disaggregations of flows and levels of finance by sector and subsector.
<b>Purpose of Data</b>	Flow of funds statistics; national accounts capital account.
<b>Detailed Description</b> <i>Population</i>	Estimates for all superannuation funds.
<b>Superannuation Data</b> <i>Items</i>	<p>Transactions, valuation adjustments and levels of financial assets and liabilities and non-financial assets.</p> <p>Flow of Funds data relating to superannuation (published in Cat No 5232.0) differ from those published in <i>Assets of Superannuation Funds and Approved Deposit Funds</i> (Cat. No.5636.0) in that they measure the flows as well the levels of financial assets and liabilities, with adjustments to the flows for changes in the value of the assets and liabilities . Also, flow of funds estimates are consistent with data published in the Australian National Accounts,</p>

## *Estimates of intersectoral funds flows*

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Balance of Payments and Foreign Investment statistics. It is possible to disaggregate Flow of Funds data for the Life and Superannuation sector into sub-sectors (life offices, other superannuation funds, approved deposit funds, friendly societies) while still retaining this consistency with the Australian National Accounts.

Source	ABS Survey of Balance Sheet Information, Insurance and Superannuation Commission data and price deflators maintained by industry.
Method of Collection	Analysis of information obtained from all three sources.
Frequency	Quarterly.
Timeliness	Only one release, of developmental estimates, has been made so far. Flows data for March and June quarters 1989 were released in July 1990.
Historical Data	December 1988 first quarter for levels data, March 1989 first quarter for flows and adjustments.
Geographic Breakdown	Flow of Funds statistics focus on flows between each sector and other sectors of the domestic economy and/or the rest of the world (non-residents as a group). However, figures for total of domestic sectors provide a measure of the total Australian domestic market for each financial instrument.
Level of Confidentiality/Availability	Most cells unlikely to be confidential.
Unpublished Information	Levels and adjustments not published; finer disaggregations not published. A Special Data Service is available, contact Derick Cullen, Director, Flow of Funds Section on (06) 252 6244 for details.

<b>Name of Organisation</b>	<p>Australian Bureau of Statistics Cameron Offices, Chandler Street, Belconnen ACT 2616.</p> <p>Telephone: (06)252 7911 Fax: (06)251 6009</p>
<b>Contact</b> <i>About these statistics</i>	<p>Mr Allan Etheridge, Assistant Director Household Income &amp; Expenditure Section (W41b), PO Box 10, Belconnen ACT 2616.</p> <p>Telephone: (06)252 7031</p>
<b>To purchase statistics</b>	<ul style="list-style-type: none"> <li>• as a publication refer to order form on page 89.</li> <li>• <i>see also</i> Unpublished Information.</li> </ul>
<b>Dissemination Media</b>	<p>Publication: 1988-89 <i>Household Expenditure Survey, Australia, Detailed Expenditure Items</i> (Cat. No. 6535.0) (\$16.50).</p> <p>Publication: 1988-89 <i>Household Expenditure Survey, Australia, Household Characteristics</i> (Cat. No. 6531.0) (\$15.50).</p>
<b>Broad Description</b>	Household expenditure data at the finest level of detail.
<b>Purpose of Data</b>	Data are collected as part of the Household Expenditure Survey (HES), which provides data to update the weighting pattern of the CPI, and to provide data for research and planning purposes. For example, HES data can be used to analyse distributional characteristics of expenditure and data can be generated relating to consumer behaviour.
<b>Detailed Description</b> <i>Population</i>	Households in private dwellings and caravan parks. Hotels, boarding houses, institutions, etc. are regarded as special dwellings outside the scope of the survey.
<b>Superannuation Data</b> <i>Items</i>	Average weekly household expenditure (\$) on superannuation and annuities by gross income quintile.



Average expenditure for only those households recording such expenditure is also available on request, as unpublished information.

The above statistics are contained in Cat. No. 6535.0, whereas those described below are in Cat. No. 6531.0.

For households with superannuation as principal source of income, for each gross income quintile: expenditure by broad expenditure group (Fuel & Power, Clothing & Footwear, Transport, Recreation etc.) and selected other payments (income tax, mortgage payment-principal, and other capital housing costs) and household characteristics (average weekly household income, average age of reference person, average number of persons in the household, proportion of households where housing is owned outright etc.)

Note that superannuation received as a lump sum is regarded as maturity of an investment rather than income, whereas superannuation receipts received regularly and are of a recurring nature are regarded as income.

Other identifying characteristics of households can be used when requesting unpublished information, for example, number of retired persons in households and number of pension beneficiaries in households.

**Source**

Collected by ABS as part of the Household Expenditure Survey.

**Method of Collection**

The Household Expenditure Survey covers approximately 7,400 households throughout Australia. Trained interviewers collect information on expenditure items which occur infrequently and details of income from all household members aged 15 and over. In addition, household members aged 15 and over record all payments made during a two week

	<p>period in a diary provided to each of them. Consequently, each household is involved in the survey for 2 weeks, although the sample of households is spread evenly over the twelve month survey period.</p>
<b>Frequency</b>	<p>Irregular.</p>
<b>Timeliness</b>	<p>About 18 months after the reference period.</p>
<b>Historical Data</b>	<p>Housing Expenditure Surveys were previously conducted in 1974-75, 1975-76, 1984 and 1988-89.</p>
<b>Geographic Breakdown</b>	<p>Australia, State, capital cities and certain other geographic areas.</p>
<b>Level of Confidentiality/ Availability</b>	<p>Data are subject to confidentiality restrictions under the Census and Statistics Act, which requires that information not be released in a manner that is likely to enable identification of a particular person or organisation.</p> <p>In addition, the amount of detail which can be made available for a specific geographic area will depend on the level of standard error that is considered acceptable for the use to which the data will be put.</p>
<b>Unpublished Information</b>	<p>Non-publication data releases are primarily unidentified unit record data (on magnetic tape or floppy disk), special order tables (in hardcopy or machine readable form) or specific purpose data release (ie. ABS processes unit record data for you). Prices for these services are available on request. Contact the Director, Household Income and Expenditure Section, ABS, PO Box 10, Belconnen ACT 2616.</p>

<b>Name of Organisation</b>	Australian Bureau of Statistics Cameron Offices, Chandler Street, Belconnen ACT 2616.  Telephone: (06) 252 7911 Fax: (06) 251 6009
<b>Contact</b> <i>About these statistics</i>	Steve Crabb, Project Manager, Economy Wide Surveys Industry Censuses and Systems Section (W71b), PO Box 10, Belconnen ACT 2616  Telephone: (06) 252 5521
<i>To purchase statistics</i>	<ul style="list-style-type: none"> <li>• as a publication refer to order form on page 89.</li> <li>• <i>see also</i> Unpublished Information.</li> </ul>
<b>Dissemination Media</b>	Publication: <i>Economy Wide Statistics, Australia, Preliminary</i> (Cat. No. 8140.0). This publication is expected to be released in 1991. These statistics are not currently available on electronic media.
<b>Broad Description</b>	Profit and Loss (Financial) Statement and Balance Sheet information for all industries.
<b>Purpose of Data</b>	To provide financial statistics, including aggregates and ratios, based on profit and loss and balance sheet accounts of businesses in all industries of the Australian economy.
<b>Detailed Description</b> <i>Population</i>	The survey frame for the Economic Activity Survey included all survey units (i.e. Management Units) which operated for some time between 1 July 1989 and 30 June 1990 and were not considered to be part of the General Government sector.
<i>Superannuation Data</i> <i>Items</i>	The Economic Activity Survey collects detailed income and expense items and broad level asset and liability information. For the 1989/90 reference period these data will mainly be used to produce broad estimates and ratios. In future Economic Activity Surveys, detailed income and expense items more appropriate to the superannuation industry will be collected

and, subject to confidentiality and quality checks, will be released. As data are only available at the subdivision level of the Australian Standard Industrial Classification, separate data for the superannuation industry are not available (ie. they are included with data for the insurance industry).

<b>Source</b>	Compiled from information collected by the ABS from its Economic Activity Survey.
<b>Method of Collection</b>	The Economic Activity Survey covers over 9,000 Management Units. Due to the stratification used by the ABS, the number of superannuation entities covered is not known. However, in the whole insurance and superannuation industry the survey covered 250 Management Units including the largest 7 private life offices, 5 State government insurance offices and approximately 100 of the largest superannuation funds that directly invest in financial assets on their own behalf.
<b>Frequency</b>	Annual.
<b>Timeliness</b>	Within 12 months of the end of the financial period.
<b>Historical Data</b>	Annual data from 1989/90 will be available.
<b>Geographic Breakdown</b>	Data are available for Australia only.
<b>Level of Confidentiality/Availability</b>	<p>Data are subject to confidentiality restrictions under the Census and Statistics Act.</p> <p>Data are currently only available at the subdivision level of the Australian Standard Industrial Classification. This means that superannuation statistics are included with the Insurance industry.</p>
<b>Unpublished Information</b>	Unpublished data may be available on request, subject to the confidentiality restrictions above, and quality checks. Contact Steve Crabb, Project Manager, Economy Wide Surveys on (06) 252 5521 for details.

**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 2527911

Fax: (06) 251 6009

**Contact**

*About these statistics  
and to purchase  
published statistics  
on floppy disk*

Mr Michael Jones, Manager, Supplementary  
Surveys  
Labour Force Section (BCG), PO Box 10,  
Belconnen ACT 2616

Telephone: (06) 252 6503

**To purchase statistics**

- as a publication, refer to order form on page 89.
- see also Unpublished Information.

**Dissemination Media**

Publication: *Employment Benefits, Australia* (Cat. No. 6334.0) (\$11.50).

**Broad Description**

Information on forms of remuneration (other than usual pay) received by employees and other conditions of their employment.

**Purpose of Data**

Estimates of the numbers and types of employment benefits (including superannuation) received by employees, cross-classified by demographic and labour force characteristics.

**Detailed Description  
Population**

Persons aged 15 and over employed as wage and salary earners.

**Superannuation Data  
Items**

Superannuation scheme membership provided by an employer as a benefit in an employee's main job. Data items may be cross-classified by gender, occupation, industry, full or part-time work, age, permanent or casual employment, weekly earnings, sector, size of location.

**Source**

This survey is conducted by ABS as a supplement to the Labour Force Survey.

**Method of Collection**

The Labour Force Survey is dwellings-based and covers about three-fifths of one per cent of the population of Australia. The information is

	obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.
<b>Frequency</b>	Biennially.
<b>Timeliness</b>	4 months after the reference period.
<b>Historical Data</b>	Similar surveys were conducted in February to May 1979, and annually since August 1983. The survey will be conducted next in August 1991 and then every two years.
<b>Geographic Breakdown</b>	Data are available for Australia, each State and Territory and for certain regions within each State.
<b>Level of Confidentiality/ Availability</b>	Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.
<b>Unpublished Information</b>	Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.

<b>Name of Organisation</b>	Australian Bureau of Statistics Cameron Offices, Chandler Street, Belconnen ACT 2616.  Telephone: (06) 252 7911 Fax: (06) 251 6009
<b>Contact</b> <i>About these statistics and to purchase published statistics on floppy disk</i>	Ms Mirella Wilson, Manager, Supplementary Surveys Labour Force Section (BCG), PO Box 10, Belconnen ACT 2616  Telephone: (06) 252 6661
<b>To purchase statistics</b>	<ul style="list-style-type: none"> <li>• as a publication, refer to order form on page 89.</li> <li>• see also Unpublished Information.</li> </ul>
<b>Dissemination Media</b>	Publication: <i>Labour Force Status and Other Characteristics of Migrants, Australia</i> (Cat. No. 6250.0), (\$11.50).
<b>Broad Description</b>	Labour force status and other characteristics of migrants.
<b>Purpose of Data</b>	Provides information on the nature of migration and relates this to participation in the labour force.
<b>Detailed Description</b> <i>Population</i>	Persons who were not born in Australia, who arrived in Australia after 1970 (1960 for pre-1990 surveys), were aged 18 or more on arrival, were allowed to stay permanently and were members of the civilian population.
<b>Superannuation Data</b> <i>Items</i>	The number of persons who stated that superannuation was their main source of income. Data items may be cross-classified with gender, age, labour force status, migration category, birthplace, educational attainment on arrival etc.
<b>Source</b>	This survey is conducted by ABS as a supplement to the Labour Force Survey.
<b>Method of Collection</b>	The Labour Force Survey is dwellings-based and covers about three-fifths of one per cent of

	<p>the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.</p>
<b>Frequency</b>	<p>Tri-ennially.</p>
<b>Timeliness</b>	<p>6 months after the reference period.</p>
<b>Historical Data</b>	<p>This survey was conducted in 1984, 1987 and 1990. However, data about superannuation as a main source of income was first asked in the 1990 survey. The survey is scheduled to be run again in 1993.</p>
<b>Geographic Breakdown</b>	<p>Data are available for Australia, each State and Territory and for certain regions within each State.</p>
<b>Level of Confidentiality/ Availability</b>	<p>Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.</p>
<b>Unpublished Information</b>	<p>Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.</p>



**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 252 7911

Fax: (06) 251 6009

**Contact**

*About these statistics  
and to purchase  
published statistics  
on floppy disk*

Ms Mirella Wilson, Manager, Supplementary  
Surveys  
Labour Force Section (BCG), PO Box 10,  
Belconnen ACT 2616

Telephone: (06) 252 6661

**To purchase statistics**

- as a publication, refer to order form on page 89.
- *see also* Unpublished Information.

**Dissemination Media**

Publication: *Persons Employed at Home, Australia*  
(Cat. No. 6275.0) (\$11.50).

**Broad Description**

Provides details of persons who work more than half their hours at home, including industry, occupation and reasons for working at home.

**Purpose of Data**

Facilitates the examination of structural change in the economy, and trends in the incidence and variety of home-based employment.

**Detailed Description  
Population**

Persons aged 15 years and over, excluding farmers, who usually worked more than half their hours at home.

**Superannuation Data  
Items**

Data are available on type of superannuation coverage cross-classified by industry and gender. These data items may be cross-classified by industry, gender, hours worked, union membership and whether worked for payment in kind.

**Source**

This survey is conducted by the ABS as a supplement to the Labour Force Survey.

**Method of Collection**

The Labour Force Survey is dwellings-based and covers about three-fifths of one per cent of the population of Australia. The information is

	obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.
<b>Frequency</b>	Tri-ennially.
<b>Timeliness</b>	4 months.
<b>Historical Data</b>	This survey was first conducted in April 1989, the next survey is scheduled for March 1992.
<b>Geographic Breakdown</b>	Data are available for Australia, each State and Territory and for certain regions within each State.
<b>Level of Confidentiality/ Availability</b>	Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.
<b>Unpublished Information</b>	Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.

**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
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Fax: (06) 251 6009

**Contact**

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on floppy disk*

Ms Mirella Wilson, Manager, Supplementary  
Surveys  
Labour Force Section (BCG), PO Box 10,  
Belconnen ACT 2616

Telephone: (06) 252 6661

**To purchase statistics**

- as a publication, refer to order form on page 89.
- see also Unpublished Information.

**Dissemination Media**

Publication: *Persons Who Have Left the Labour Force, Australia* (Cat. No. 6267.0) (\$11.50).

**Broad Description**

Provides details of persons who worked or looked for work at some time during the year, but were not in the labour force during the reference week.

**Purpose of Data**

Provide summary characteristics of persons who have left the labour force, for use in projecting changes to the labour force.

**Detailed Description  
Population**

Civilian persons aged 15 and over who left the labour force within the twelve month period prior to the commencement of the survey.

**Superannuation Data  
Items**

Superannuation received as a main source of income. This may be cross classified with gender, age, birthplace, marital status and intention to return to the labour force.

**Source**

This survey is conducted by ABS as a supplement to the Labour Force Survey.

**Method of Collection**

The Labour Force Survey is dwellings-based and covers about three-fifths of one per cent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional

*Characteristics of persons who have left the labour force*

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	questions relating to special topics are asked of those who fall within the scope of the supplementary survey.
<b>Frequency</b>	Tri-ennially.
<b>Timeliness</b>	11 months.
<b>Historical Data</b>	Data were first collected in November 1985, repeated in April 1988 and April 1991.
<b>Geographic Breakdown</b>	Data are available for Australia, each State and Territory and for certain regions within each State.
<b>Level of Confidentiality/ Availability</b>	Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.
<b>Unpublished Information</b>	Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.

**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 252 7911

Fax: (06) 251 6009

**Contact**

*About these statistics  
and to purchase  
published statistics  
on floppy disk*

Mis Sue Doyle, Manager, Supplementary  
Surveys  
Labour Force Section (BCG), PO Box 10,  
Belconnen ACT 2616

Telephone: (06) 252 7204

**To purchase statistics**

- as a publication, refer to order form on page 89.
- see also Unpublished Information.

**Dissemination Media**

Publication: *Retirement and Retirement Intentions, Australia* (6238.0) (\$8.00).

**Broad Description**

Details of retirement or retirement intentions of persons aged 45 and over, including main source of income, retirement scheme coverage and housing arrangements.

**Purpose of Data**

Comparative profile, and whether persons had retired or intended to retire from work with superannuation as the main source of income.

**Detailed Description  
Population**

Persons aged 45 and over excluding persons permanently unable to work and institutionalised persons.

**Superannuation Data  
Items**

For retired persons: retirement scheme membership, type of payment from retirement scheme, disbursement of lump sum payment on retirement, lump sum payments from superannuation schemes, expected main source of income at retirement.

For persons who intended to retire: retirement scheme membership, expected type of payment from retirement scheme, intended disbursement of lump sum on retirement, expected main source of income at retirement.

These data items can be cross classified with status of last job, reason for early retirement, gender, age and birthplace.

<b>Source</b>	Survey conducted by ABS as a supplement to the Labour Force Survey.
<b>Method of Collection</b>	The Labour Force Survey is dwellings-based and covers about three-fifths of one percent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.
<b>Frequency</b>	Biennially.
<b>Timeliness</b>	7 months after the reference period.
<b>Historical Data</b>	The survey was first conducted in November 1986, again in November 1989, and is scheduled next for October 1992 and every 2 years thereafter.
<b>Geographic Breakdown</b>	Data are available for Australia, each State and Territory and for certain regions within each State.
<b>Level of Confidentiality/ Availability</b>	Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.
<b>Unpublished Information</b>	Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.

**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 252 7911

Fax: (06) 251 6009

**Contact**

*About these statistics  
and to purchase  
published statistics  
on floppy disk*

Ms Sue Doyle, Manager, Supplementary  
Surveys  
Labour Force Section (BCG), PO Box 10,  
Belconnen ACT 2616

Telephone: (06) 252 7204

**To purchase statistics**

- as a publication, refer to order form on page 89.
- *see also* Unpublished Information.

**Dissemination Media**

Publication: *Superannuation Australia* (Cat. No. 6319.0) (\$8.50).

**Broad Description**

Provides information on the number and characteristics of persons covered by superannuation schemes.

**Purpose of Data**

Provides details of persons who currently belong to a superannuation scheme, and some details of persons who once belonged to a superannuation scheme are also provided, the relationship between superannuation and the age pension.

**Detailed Description  
Population**

Civilian persons aged 15 to 74, excepting institutionalised persons and persons aged 15 to 20 still at school.

**Superannuation Data  
Items**

Expected type of payment from a superannuation scheme, time in a superannuation scheme, provider of a superannuation scheme, whether scheme membership is optional, proportion of earnings paid as own contributions to superannuation scheme, weekly contributions. Persons covered or not covered by superannuation, age of retirement, expected main source of income,

	occupation, industry, sector, and socio-demographic data.
<b>Source</b>	This survey is conducted by the ABS as a supplement to the Labour Force Survey.
<b>Method of Collection</b>	The Labour Force Survey is dwellings-based and covers about three-fifths of one percent of the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.
<b>Frequency</b>	Biennially.
<b>Timeliness</b>	5 months after the reference period.
<b>Historical Data</b>	Similar surveys were conducted in February 1974, September to November 1982 and in November 1988. The next survey is scheduled for November 1991 and every 2 years thereafter.
<b>Geographic Breakdown</b>	Data are available for Australia, each State and Territory and for certain regions within each State.
<b>Level of Confidentiality/ Availability</b>	Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.
<b>Unpublished Information</b>	Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.



**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 252 7911

Fax: (06) 251 6009

**Contact**

*About these statistics  
and to purchase  
published statistics  
on floppy disk*

Mr Michael Jones, Manager, Supplementary  
Surveys  
Labour Force Section, PO Box 10, Belconnen  
ACT 2616

Telephone: (062) 252 6503

**To purchase statistics**

- as a publication, refer to order form on page 89.
- see also Unpublished Information.

**Dissemination Media**

Publication: *Trade Unions, Australia* (Cat. No. 6325.0) (\$11.50).

**Broad Description**

Social and demographic characteristics of union members and non-union members, who are employees in their main job.

**Purpose of Data**

Provides a comparison of union members and non-members. Characteristics of labour force participation are also provided.

**Detailed Description  
Population**

All employees, aged 15 and over, who were wage and salary earners in a main job. Persons on workers compensation are excluded.

**Superannuation Data  
Items**

Persons covered and not covered by a superannuation scheme and the source of the superannuation scheme, other data items include: gender, age, sector, whether a member of a trade union, weekly earnings, industry and occupation.

**Source**

This survey is conducted by ABS as a supplement to the Labour Force Survey.

**Method of Collection**

The Labour Force Survey is dwellings-based and covers about three-fifths of one per cent of

	<p>the population of Australia. The information is obtained from the occupants of selected dwellings by trained interviewers. Additional questions relating to special topics are asked of those who fall within the scope of the supplementary survey.</p>
<b>Frequency</b>	Biennially.
<b>Timeliness</b>	4 months.
<b>Historical Data</b>	Similar surveys were conducted in March-May 1982, August 1986, August 1988 and August 1990.
<b>Geographic Breakdown</b>	Data are available for Australia, each State and Territory and for certain regions within each State.
<b>Level of Confidentiality/ Availability</b>	Tables compiled from ABS household surveys do not enable individual respondents to be identified. As a result, a wide range of customised tables can be produced.
<b>Unpublished Information</b>	Unpublished tables are available on request as a special data service. Contact the Assistant Director, Labour Force Section (Supplementary Surveys) on (06) 252 6504 for an order form and to discuss your data needs. Customised tables are available on computer printout, microfiche or floppy disk. Prices for the special data service depend on the medium of supply and the volume of data, and are available on request.

<b>Name of Organisation</b>	Australian Bureau of Statistics Cameron Offices, Chandler Street, Belconnen ACT 2616  Telephone: (06) 252 7911 Fax: (06) 251 6009
<b>Contact</b> <i>About these statistics</i>	Mr Geoff Neideck, Assistant Director Labour Income, Disputes and Costs Section (W41c), PO Box 10, Belconnen ACT 2616  Telephone: (06) 252 6661
<i>To purchase statistics</i>	<ul style="list-style-type: none"> <li>• as a publication, refer to order form on page 89.</li> <li>• see also Unpublished Information.</li> </ul>
<b>Dissemination Media</b>	Publication: <i>Major Labour Costs, Australia</i> (Cat. No 6348.0) (\$18.00).
<b>Broad Description</b>	Employer labour costs (including employer-provided superannuation).
<b>Purpose of Data</b>	To provide information on the costs to employers of employing labour.
<b>Detailed Description</b> <i>Population</i>	All private and public sector employers in all States and Territories and in all industries except agriculture, forestry, fishing and hunting. Private households employing staff, and the Australian permanent defence forces are also excluded.
<b>Superannuation Data</b> <i>Items</i>	Superannuation costs given are the total payments made by employers with respect to superannuation liabilities incurred. For the private sector these are contributions paid on a regular basis into superannuation funds. For the public sector, in addition to these payments, the cost of pension or lump sum payments which are not covered by contributions during the employees service are also included.

Superannuation data are presented on the following basis: total cost; cost per employee; cost per employee covered by superannuation; cost as a percentage of major labour costs; cost as a ratio to employees earnings; and percentage of employees covered by superannuation. Data are available by sector, State and Territory, employer size, industry and institutional sector and level of government.

For example, the statistics show that for 1988-89 the private sector average superannuation costs per employee covered by superannuation decreased from \$2,070 in 1987-88 to \$1,713 in 1988-89. In 1988-89 40.6 per cent of employees in the private sector were covered by superannuation, compared to 34.1 per cent in the previous year.

**Source**

ABS conducts a survey of major labour costs.

**Method of Collection**

The survey is conducted by mail covering 5000 private sector employers and 1500 government sector employers selected from the ABS business register. Superannuation Boards and Treasury Departments provide some information for government organisations directly to the ABS.

**Frequency**

Annually.

**Timeliness**

12 months after the reference period. Historical Data

The survey commenced in 1985-86 in respect of the private sector only. In 1986-87 the survey was expanded to include the public sector.

**Geographic Breakdown**

Data are available for Australia and each State and Territory.

**Level of Confidentiality/ Availability**

Data are subject to confidentiality restrictions under the Census and Statistics Act. Data at less aggregated levels may also be suppressed due to high sampling error.

**Unpublished  
Information**

Unpublished data are available on request,  
subject to the restrictions above.

**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 252 7911  
Fax: (06) 251 6009

**Contact****About these statistics**

Ross Harvey, Director  
National Income & Expenditure Section, PO  
Box 10, Belconnen ACT 2617

Telephone: (06) 252 6713

**To purchase statistics**

- as a publication, refer to order form on page 89.
- see also Unpublished Information.

**Dissemination Media**

Publication: *Australian National Accounts: National Income & Expenditure* (Cat No 5204.0) (\$20.00). This publication contains various tables relating to superannuation.

**Broad Description**

National accounts aggregates contained in Income and Outlay and Capital Accounts.

**Purpose of Data**

Life insurance offices and superannuation funds are a subsector of the financial enterprises institutional sector in the Australian National Accounts.

**Detailed Description  
Population**

All life insurance offices and superannuation funds.

**Superannuation Data  
Items**

Income and Outlay Account and Capital Account for life insurance offices and superannuation funds. Included are details about premiums, claims, administrative costs, property income and net equity of households in life offices and superannuation funds.

Source	Compiled from all available data sources, including ABS publications and data from the Insurance and Superannuation Commission.
Method of Collection	Analysis of all available relevant information.
Frequency	Annual.
Timeliness	10 to 11 months after the end of the financial year to which the data relate.
Historical Data	Data published for latest 12 years.
Geographic Breakdown	Data generally available for Australia.
Level of Confidentiality/ Availability	No confidentiality restrictions apply since only aggregate data are available for the whole industry.
Unpublished Information	There are no unpublished data available.

**Name of Organisation**

Australian Bureau of Statistics  
Cameron Offices, Chandler Street, Belconnen  
ACT 2616

Telephone: (06) 252 7911

Fax: (06) 251 6009

**Contact*****About these statistics***

Dene Baines, Assistant Director  
Private Finance Section (W6Gb), PO Box 10,  
Belconnen ACT 2616

Telephone: (06) 252 7109

***To purchase statistics***

as a publication refer to order form on page 89.

***Dissemination Media***

Publication: *Assets of Superannuation Funds and  
Approved Deposit Funds* (Cat. No. 5656.0),  
(\$10.00). These statistics are not currently  
available on electronic media.

***Broad Description***

Balance Sheet information.

***Purpose of Data***

To provide information on the size and growth  
of superannuation funds as a source of savings.

***Detailed Description******Population***

All public and private sector superannuation  
funds excluding funds where the employee  
makes no contribution and all benefits are met  
entirely from employers' resources as they  
become payable.

***Superannuation Data  
Items***

Separate statistics are presented for assets of  
superannuation funds held in the statutory  
funds of Life Insurance Offices and for assets  
of superannuation funds combined with assets  
of Approved Deposit Funds held outside the  
superannuation funds and approved deposit  
funds statutory funds of Life Insurance Offices.  
The latter are also shown sub-divided into  
assets invested directly and those invested  
through fund managers. For example, the  
statistics show that, at 31 March 1990, of the  
\$65,429 million superannuation fund assets  
held outside the statutory funds of Life  
Insurance Offices, nearly half (\$32,603 million)



*Assets of superannuation funds and approved deposit funds*

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was invested through fund managers. A summary table of total assets of superannuation funds combined with Approved Deposit Funds is provided. All data are recorded in millions of dollars. All tables show assets in Australia split between financial assets (by instrument) and non-financial. Assets overseas are shown as a total. Total assets attributable to superannuation funds and approved deposit funds are shown separately for all relevant tables.

Source	Compiled from information collected by the ABS from its Survey of Balance Sheet Information and information collected by the Insurance and Superannuation Commission (ISC) for inclusion in its Quarterly Statistical Bulletin.
Method of Collection	The ABS survey covers approximately 50 professional fund managers and approximately 100 large superannuation and approved deposit funds. The ISC survey includes all life offices.
Frequency	Quarterly.
Timeliness	3 months after the end of the reference period.
Historical Data	Data available from March Quarter 1989.
Geographic Breakdown	Data are available for Australia only.
Level of Confidentiality/ Availability	Data are subject to confidentiality restrictions under the Census and Statistics Act. To date it has not been necessary to suppress any data for this reason.
Unpublished Information	Unpublished data may be available on request, subject to the confidentiality restrictions above. Contact Dene Baines, Assistant Director, Private Finance Section on (06) 252 7109.

<b>Name of Organisation</b>	<p>Australian Bureau of Statistics Cameron Offices, Chandler Street, Belconnen ACT 2616</p> <p>Telephone: (06) 252 7911 Fax: (06) 251 6009</p>
<b>Contact</b> <i>About these statistics</i>	<p>Peter White, Project Manager, Service Industries Surveys Service Industries Section (W71c), PO Box 10, Belconnen ACT 2616</p> <p>Telephone: (06) 252 5633</p>
<i>To purchase statistics</i>	<ul style="list-style-type: none"> <li>• as a publication, refer to order form on page 89.</li> <li>• <i>see also</i> Unpublished Information.</li> </ul>
<b>Dissemination Media</b>	Publications: Publications are available covering a range of industries.
<b>Broad Description</b>	Series of industry-specific ABS publications containing, among other industry operating characteristics, the item "Employer contributions to superannuation and pension schemes".
<b>Purpose of Data</b>	One of a series of business expense items collected for purpose of analysis of business operations in various industries.
<b>Detailed Description</b> <i>Population</i>	All businesses in various industries.
<b>Superannuation Data</b> <i>Items</i>	Single expense item "Employer contributions to superannuation and pension schemes". Data generally in \$m. The statistics show, for example, that for the Real Estate Agents Industry in 1987-88 "Employer contributions to superannuation and pension schemes" totalled \$37.8m.
<b>Source</b>	ABS Industry Surveys.
<b>Method of Collection</b>	Mail-based survey of businesses.

*Industry operating characteristics*

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Frequency	Irregular.
Timeliness	Not applicable.
Historical Data	Very limited data for some of the industries included in the ABS series "Enterprise Statistics" for 1979-80 and 1968-69.
Geographic Breakdown	Mainly only for Australia. Some information is available at State level for some of the industries.
Level of Confidentiality/ Availability	Data items are available for each industry (ASIC class).
Unpublished Information	Some further dissections (by State for example) are available for a few of the Industries.

<b>Name of Organisation</b>	Australian Taxation Office 2 Constitution Avenue, Canberra City ACT 2601  Telephone: (06) 275 1896 Fax: (06) 275 2368
<b>Contact</b> <i>About these statistics</i>	Dennis Hayes, Director Revenue Analysis Branch, PO Box 900, Civic Square 2608  Telephone: (06) 275 1831
<i>To purchase statistics</i>	Australian Government Publishing Service in each capital city. Postal address for mail orders is AGPS, GPO Box 84, Canberra ACT 2601.
<b>Dissemination Media</b>	Publication: <i>Taxation Statistics</i> (Cat. No. 9023228 for the 1988-89 edition) (\$29.95). These statistics are not currently available on other media.
<b>Broad Description</b>	Information obtained from income tax returns.
<b>Purpose of Data</b>	To provide information in respect of itemised information obtained from income tax returns.
<b>Detailed Description</b> <i>Population</i>	Statistics are obtained from income tax returns and assessments processed in the 12 months period following the end of the income year.
<i>Superannuation Data</i> <i>Items</i>	Separate statistics are provided for eligible termination payments which are 5 per cent assessable, those taxable at 15 per cent and those taxable at 30 per cent. Data are provided by grade of taxable income, number of taxpayers with the item and the item in million dollar units.
<b>Source</b>	Income tax returns of individuals.
<b>Method of Collection</b>	Information obtained from all income tax returns and assessments processed in the 12 months period following the end of the income year.
<b>Frequency</b>	Annually.

<b>Timeliness</b>	Generally published November, December each year. That is, about 18 months after the end of the income year to which the income tax returns relate.
<b>Historical Data</b>	Data available from 1983-84 income year onwards. Note that if data for a particular year are required it is necessary to refer to the appropriate edition of <i>Taxation Statistics</i> .
<b>Geographic Breakdown</b>	Data are available for Australia and each State of assessment.
<b>Level of Confidentiality/ Availability</b>	Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).
<b>Unpublished Information</b>	Generally, all data available, subject to the confidentiality restrictions above, are published.

<b>Name of Organisation</b>	Australian Taxation Office 2 Constitution Avenue, Canberra City ACT 2601  Telephone: (06) 275 1896 Fax: (06) 275 2368
<b>Contact</b> <i>About these statistics</i>	Dennis Hayes, Director Revenue Analysis Branch, PO Box 900, Civic Square ACT 2608  Telephone: (06) 275 1831
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<b>Broad Description</b>	Information obtained from income tax returns.
<b>Purpose of Data</b>	To provide information in respect of itemised information obtained from income tax returns.
<b>Detailed Description</b> <i>Population</i>	Statistics obtained from income tax returns and assessments processed in the 12 months period following the end of the income year.
<i>Superannuation Data</i> <i>Items</i>	Details of number of taxpayers claiming self-employed superannuation contributions and amounts claimed by grade of taxable income. The item is recorded in million dollar units.
<b>Source</b>	Income tax returns of individuals.
<b>Method of Collection</b>	Information obtained from all income tax returns and assessments processed in the 12 months period following the end of the income year.
<b>Frequency</b>	Annually.
<b>Timeliness</b>	Generally published November, December each year. That is, about 18 months after the end of

*Superannuation contributions claimed by  
self-employed persons*

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the income year to which the income tax returns relate.

**Historical Data**

Data available from 1980-81 income year onwards. Note that if data for a particular year are required it is necessary to refer to the appropriate edition of *Taxation Statistics*.

**Geographic  
Breakdown**

Data are available for Australia and each State of assessment.

**Level of  
Confidentiality/  
Availability**

Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).

**Unpublished  
Information**

Generally, all data available, subject to the confidentiality restrictions above, are published.

<b>Name of Organisation</b>	Australian Taxation Office 2 Constitution Avenue, Canberra City ACT 2601  Telephone: (06) 275 1896 Fax: (06) 275 2368
<b>Contact</b> <i>About these statistics</i>	Dennis Hayes, Director Revenue Analysis Branch, PO Box 900, Civic Square ACT 2608  Telephone: (06)275 1831
<i>To purchase statistics</i>	Australian Government Publishing Service in each capital city. Postal address for mail orders is AGPS, GPO Box 84, Canberra ACT 2601.
<b>Dissemination Media</b>	Publication: <i>Taxation Statistics</i> (Cat. No. 9023228 for the 1988-89 edition) (\$29.95). These statistics are not currently available on other media.
<b>Broad Description</b>	Information obtained from income tax returns.
<b>Purpose of Data</b>	To provide information in respect of itemised information obtained from income tax returns.
<b>Detailed Description</b> <i>Population</i>	Statistics obtained from income tax returns and assessments processed in the 12 months period following the end of the income year.
<b>Superannuation Data</b> <i>Items</i>	Details of number of taxpayers with Australian Government Pensions and other benefits and amounts received by grade of taxable income. The item is recorded in million dollar units. Statistics for the item Australian Government Pensions and other benefits were not compiled for cases which were clerically assessed and computer issued. The 7,906,117 taxable and 348,892 non-taxable assessments processed included 209,124 taxable and 48,119 non-taxable assessments which were clerically assessed and computer issued.
<b>Source</b>	Income tax returns of individuals.



<b>Method of Collection</b>	Information obtained from all income tax returns and assessments processed in the 12 months period following the end of the income year.
<b>Frequency</b>	Annually.
<b>Timeliness</b>	Generally published November, December each year. That is, about 18 months after the end of the income year to which the income tax returns relate.
<b>Historical Data</b>	Data available from 1976-77 income year onwards. Note that if data for a particular year are required it is necessary to refer to the appropriate edition of <i>Taxation Statistics</i> .
<b>Geographic Breakdown</b>	Data are available for Australia and each state of assessment.
<b>Level of Confidentiality/ Availability</b>	Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).
<b>Unpublished Information</b>	Generally, all data available, subject to the confidentiality restrictions above, are published.

<b>Name of Organisation</b>	Australian Taxation Office 2 Constitution Avenue, Canberra City ACT 2601  Telephone: (06) 275 1896 Fax: (06) 275 2368
<b>Contact</b> <i>About these statistics</i>	Dennis Hayes, Director Revenue Analysis Branch, PO Box 900, Civic Square ACT 2608  Telephone: (06)275 1831
<i>To purchase statistics</i>	Australian Government Publishing Service in each capital city. Postal address for mail orders is AGPS, GPO Box 84, Canberra ACT 2601.
<b>Dissemination Media</b>	Publication: <i>Taxation Statistics</i> (Cat. No. 9023228 for the 1988-89 edition) (\$29.95). These statistics are not currently available on other media.
<b>Broad Description</b>	Information obtained from income tax returns.
<b>Purpose of Data</b>	To provide information in respect of itemised information obtained from income tax returns.
<b>Detailed Description</b> <i>Population</i>	Statistics obtained from income tax returns and assessments of superannuation funds, approved deposit funds and pooled superannuation trusts processed from 1 July 1989 to 24 September 1990.
<i>Superannuation Data</i> <i>Items</i>	Separate statistics are provided by grade of net tax, grade of taxable income and grade of total investments. The items are recorded in million dollar units.
<b>Source</b>	Income tax returns of the funds and pooled superannuation trusts.
<b>Method of Collection</b>	Information obtained from all income tax returns and assessments processed in the period 1 July 1989 to 24 September 1990.
<b>Frequency</b>	Annually.

*Income tax returns of superannuation funds,  
approved deposit funds and pooled superannuation  
trusts*

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Timeliness	Generally published November, December each year. That is, about 18 months after the end of the income year to which the income tax returns relate.
Historical Data	Data available for some earlier years but not comparable because of changes in the taxation laws applying to funds. Note that if data for a particular year are required it is necessary to refer to the appropriate edition of <i>Taxation Statistics</i> .
Geographic Breakdown	Data are available for Australia.
Level of Confidentiality/ Availability	Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).
Unpublished Information	Generally, all data available, subject to the confidentiality restrictions above, are published.

<b>Name of Organisation</b>	Australian Taxation Office 2 Constitution Avenue, Canberra City ACT 2601  Telephone: (06) 275 1896 Fax: (06) 275 2368
<b>Contact</b> <i>About these statistics</i>	Dennis Hayes, Director Revenue Analysis Branch, PO Box 900, Civic Square ACT 2608  Telephone: (06) 275 1831
<i>To purchase statistics</i>	Australian Government Publishing Service in each capital city. Postal address for mail orders is AGPS, GPO Box 84, Canberra ACT 2601.
<b>Dissemination Media</b>	Publication: <i>Taxation Statistics</i> (Cat No 9023228 for the 1988-89 edition) (\$29.95). These statistics are not currently available on other media.
<b>Broad Description</b>	Information obtained from income tax returns.
<b>Purpose of Data</b>	To provide information in respect of itemised information obtained from income tax returns.
<b>Detailed Description</b> <i>Population</i>	Statistics obtained from income tax returns and assessments of taxable companies processed in the year 1 July 1989 to 30 June 1990.
<i>Superannuation Data</i> <i>Items</i>	Statistics are provided for amounts allowed as deductions for contributions to superannuation, provident, benefit or retirement funds by employers in respect of employees. Separate statistics are provided by grade of taxable income, for public and private companies and by industry classification. The item is recorded in million dollar units.
<b>Source</b>	Income tax returns of companies.
<b>Method of Collection</b>	Information obtained from all income tax returns and assessments processed in the 12 months period following the end of the income year.

*Employer superannuation contributions claimed by  
private and public companies*

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Frequency	Annually.
Timeliness	Generally published November, December each year. That is, about 18 months after the end of the income year to which the income tax returns relate.
Historical Data	Data are available from 1969-70 income year onwards. Note that if data for a particular year are required it is necessary to refer to the appropriate edition of <i>Taxation Statistics</i> .
Geographic Breakdown	Data are available for Australia.
Level of Confidentiality/ Availability	Data are subject to confidentiality restrictions under the secrecy provisions of the Income Tax Assessment Act 1936 (as amended).
Unpublished Information	Generally, all data available, subject to the confidentiality restrictions above, are published.

<b>Name of Organisation</b>	BIS Shrapnel Level 7, 169 Miller Street, North Sydney NSW 2060  Telephone: (02) 959 5924 Fax: (02) 959 5795
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Stephen Moore, Senior Consultant
<b>Dissemination Media</b>	Publication: <i>Directory of Australian and New Zealand Superannuation Funds</i> (\$7,500.00). The publication is accompanied by a copy on floppy disk (IBM compatible).
<b>Broad Description</b>	A detailed breakdown of the structure of funds belonging to the Association of Superannuation Funds of Australia (ASFA).
<b>Purpose of Data</b>	To provide information on the composition and growth potential of major superannuation funds.
<b>Detailed Description</b> <i>Population</i>	Union, corporate and public sector/government business enterprise superannuation funds.
<b>Superannuation Data</b> <i>Items</i>	Contact details; membership size according to two largest funds; composition of trustees; director-trustee association; trustee-employer/union association; period of election/appointment of trustees; decision-makers on investment manager; composition of membership (award/non-award, etc); projected membership growth; funds' structure (defined benefit/contribution, etc).
<b>Source</b>	All data are collected by BIS Shrapnel.
<b>Method of Collection</b>	Mailed surveys distributed by BIS Shrapnel as an annual study.
<b>Frequency</b>	Annually.
<b>Timeliness</b>	Data are gathered July/August and published September.

*Directory of Australian and New Zealand  
superannuation funds*

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Historical Data	12 months.
Geographic Breakdown	National.
Level of Confidentiality/ Availability	No limits. Available to all subscribers.
Unpublished Information	Not applicable.

<b>Name of Organisation</b>	BIS Shrapnel Level 7, 169 Miller Street, North Sydney NSW 2060  Telephone: (02) 959 5924 Fax: (02) 959 5795
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Stephen Moore, Senior Consultant
<b>Dissemination Media</b>	Publication: <i>Directory of Australian Industry and Award-based Superannuation Funds</i> (\$900.00). The publication is accompanied by a copy on floppy disk (IBM compatible format).
<b>Broad Description</b>	A guide to all Federal awards and industrial agreements in which superannuation terms have been accepted by the Australian Industrial Relations Commission, the parties affected by that award or agreement (unions, employer groups) and the relevant industry fund which administers the superannuation scheme. Further, management and financial performance data of each industry fund.
<b>Purpose of Data</b>	To provide, for the first time, a summary of the complex configuration of award-based superannuation schemes.
<b>Detailed Description</b> <i>Population</i>	Union industry funds.
<b>Superannuation Data</b> <i>Items</i>	Award/union/superannuation scheme composition; financial/administrative/ investment and management activities/financial performance data.
<b>Source</b>	Department of Industrial Relations; Australian Industrial Relations Commission; industry funds survey by BIS Shrapnel.
<b>Method of Collection</b>	Data base searches; interviews with industry funds.
<b>Frequency</b>	Annually.



*Directory of Australian industry award-based  
superannuation funds*

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Timeliness	Data are gathered August/September and published in October.
Historical Data	First collected in 1991. Future years will be collected.
Geographic Breakdown	National.
Level of Confidentiality/ Availability	No limits. Available to all subscribers.
Unpublished Information	Not applicable.

<b>Name of Organisation</b>	Department of Social Security Juliana House, Woden ACT 2606
	Telephone: (06) 284 4844
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Director, Statistics Section Social Policy Division, PO Box 788, Canberra Mail Exchange, Fyshwick ACT 2609
	Telephone: (06) 244 7788
<b>Dissemination Media</b>	Publication: <i>Characteristics of Pensioners</i> (\$12.00)
<b>Broad Description</b>	Age and other characteristics of pensioners.
<b>Purpose of Data</b>	To provide a profile of DSS pensioners.
<b>Detailed Description</b> <i>Population</i>	All clients shown on DSS masterfiles.
<b>Superannuation Data</b> <i>Items</i>	Data do not directly relate to superannuation, but will be of interest for comparing social security retirement benefits with superannuation. Items include the number, and detailed breakdown by characteristics, of current DSS pensioners by pension type; additional allowance paid, fringe benefits; average weekly pension rates, duration of current benefits; average weekly pension rates, duration of current pension; grants of pension by pension type and age of pensioner. Each publication contains latest year data only.
<b>Source</b>	Data are compiled by DSS Statistics Section.
<b>Method of Collection</b>	Complete enumeration of client information from DSS payment files. This information is collected as a by-product of administering DSS programs.
<b>Frequency</b>	Annual.
<b>Timeliness</b>	Varies.
<b>Historical Data</b>	Data are available from 1981-82.
<b>Geographic Breakdown</b>	National totals and considerable detail by State. Note that State figures are for DSS

administrative state. Therefore, NSW includes ACT, Queensland includes Northern Territory and South Australia includes the Broken Hill region.

**Level of  
Confidentiality/  
Availability**

Information is quantitative and does not impinge on privacy considerations since it is not possible to identify individual clients. Publications are readily available to subscribers. For availability of unpublished information, please write to the Director, Statistics Section.

**Unpublished  
Information**

Details of unpublished information are available in the publication Printouts and Microfiche Available in Statistics Section (\$6.00). Unpublished information can be obtained by writing to the Director, Statistics Section.

<b>Name of Organisation</b>	Department of Social Security Juliana House, Woden ACT 2606  Telephone: (06) 284 4844
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Director, Statistics Section Social Policy Division, PO Box 788, Canberra Mail Exchange, Fyshwick ACT 2609  Telephone: (06) 244 7788
<b>Dissemination Media</b>	Publication: <i>Quarterly Statistical Summary</i> (\$40.00 p.a.)
<b>Broad Description</b>	Summary DSS statistics for latest quarter.
<b>Purpose of Data</b>	To provide key statistics.
<b>Detailed Description</b> <i>Population</i>	All clients shown on DSS masterfiles.
<b>Superannuation Data</b> <i>Items</i>	Data do not directly relate to superannuation, but will be of interest for comparing social security retirement benefits with superannuation. The publication contains the latest quarterly figures and an eleven year series of current numbers of pensioners, claims, grants terminations and transfers between pension types; Pensioner Health Benefit cardholders; Australian pensions paid overseas.
<b>Source</b>	Data are compiled by DSS Statistics Section.
<b>Method of Collection</b>	Complete enumeration of client information from DSS payment files. This information is collected as a by-product of administering DSS programs.
<b>Frequency</b>	Quarterly.
<b>Timeliness</b>	Varies.
<b>Historical Data</b>	Data is available from 1981-82.
<b>Geographic Breakdown</b>	Australia. State figures are available for pensioners data. Note that State figures are for DSS administrative State. Therefore, NSW includes ACT, Queensland includes Northern

<b>Level of Confidentiality/ Availability</b>	Territory and South Australia includes the Broken Hill region.
<b>Unpublished Information</b>	<p>Information is quantitative and does not impinge on privacy considerations since it is not possible to identify individual clients. Publications are readily available to subscribers. For availability of unpublished information, please write to the Director, Statistics Section.</p> <p>Details of unpublished information are available in the publication Printouts and Microfiche Available in Statistics Section (\$6.00). Unpublished information can be obtained by writing to the Director, Statistics Section.</p>

<b>Name of Organisation</b>	Department of Social Security Juliana House, Woden ACT 2606  Telephone: (06) 284 4844
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Director, Statistics Section Social Policy Division, PO Box 788, Canberra Mail Exchange, Fyshwick ACT 2609
<b>Dissemination Media</b>	Publication: <i>Pensioners and Beneficiaries as a Proportion of Population and Labour Force</i> (\$7.00).
<b>Broad Description</b>	Time series of selected DSS statistics as a proportion of population and labour force.
<b>Purpose of Data</b>	Trend analysis.
<b>Detailed Description</b> <i>Population</i>	All clients shown on DSS masterfiles.
<b>Superannuation Data</b> <i>Items</i>	Data do not directly relate to superannuation, but will be of interest for comparing social security retirement benefits with superannuation. Data include an eleven year time series of proportions of age pensioners and total pensioners of age pension age (including pensioners paid by Department of Veterans Affairs (DVA)); invalid pensioners, class B widows and sole parents; total pensioners and beneficiaries (including DVA) proportion of population and labour force; dependent children including Family Allowance Supplement, total pensioners and beneficiaries (including DVA) by age group.
<b>Source</b>	Data are compiled by DSS Statistics Section.
<b>Method of Collection</b>	Complete enumeration of client information from DSS payment files. This information is collected as a by-product of administering DSS welfare programs.
<b>Frequency</b>	Annual.
<b>Timeliness</b>	Varies.
<b>Historical Data</b>	Data are available from 1981-82.

*Pensioners and beneficiaries as a proportion of the population and the labour force*

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**Geographic  
Breakdown**

Australia. DSS statistics are also generally available by DSS administrative state. Note that this means NSW includes ACT, Queensland includes Northern Territory and South Australia includes the Broken Hill region.

**Level of  
Confidentiality/  
Availability**

Information is quantitative and does not impinge on privacy considerations since it is not possible to identify individual clients. Publications are readily available to subscribers. For availability of unpublished information, please write to the Director, Statistics Section.

**Unpublished  
Information**

Details of unpublished information are available in the publication Printouts and Microfiche Available in Statistics Section (\$6.00). Unpublished information can be obtained by writing to the Director, Statistics Section.

<b>Name of Organisation</b>	Department of Social Security Juliana House, Woden ACT 2606
	Telephone: (06) 284 4844
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Director, Statistics Section Social Policy Division, PO Box 788, Canberra Mail Exchange, Fyshwick ACT 2609
	Telephone: (06) 244 7788
<b>Dissemination Media</b>	Publication: <i>Ten Year Statistical Summary</i> (\$10.00).
<b>Broad Description</b>	Time series of selected DSS statistics.
<b>Purpose of Data</b>	Trend analysis.
<b>Detailed Description</b> <i>Population</i>	All clients shown on DSS masterfiles.
<b>Superannuation Data</b> <i>Items</i>	Data do not directly relate to superannuation, but will be of interest for comparing social security retirement benefits with superannuation. Statistics contain an eleven year time series of numbers of DSS pensioners and beneficiaries by various characteristics; expenditure, maximum rates of pension and benefit; selected demographic and economic statistics.
<b>Source</b>	Statistics are compiled by DSS Statistics Section.
<b>Method of Collection</b>	Complete enumeration of client information from DSS payment files. This information is collected as a by-product of administering DSS welfare programs.
<b>Frequency</b>	Annual.
<b>Timeliness</b>	Varies.
<b>Historical Data</b>	Data are available from 1981-82.
<b>Geographic Breakdown</b>	Australia. DSS statistics are also generally available by DSS administrative state. Note that this means NSW includes ACT, Queensland



<b>Level of Confidentiality/ Availability</b>	includes Northern Territory and South Australia includes the Broken Hill region.  Information is quantitative and does not impinge on privacy considerations since it is not possible to identify individual clients. Publications are readily available to subscribers. For availability of unpublished information, please write to the Director, Statistics Section.
<b>Unpublished Information</b>	Details of unpublished information are available in the publication Printouts and Microfiche Available in Statistics Section (\$6.00). Unpublished information can be obtained by writing to the Director, Statistics Section.

**Name of Organisation**

Insurance and Superannuation Commission  
AAA House, 212 Northbourne Avenue,  
Braddon ACT 2601

Telephone: (06) 247 2299

Fax: (06) 257 1639

**Contact**

***About these statistics***

Kevin Donovan, Assistant Director  
Superannuation Group, PO Box 178, Belconnen  
ACT 2616

Telephone: (06) 267 6864

***To purchase statistics***

Australian Government Publishing Service (AGPS) bookshops in each capital city. Mail orders through AGPS, GPO Box 84, Canberra ACT 2601. Phone shop through AGPS, on (008) 02 0049 for callers outside Canberra, and 295 4861 for local callers. Fax orders can be placed through AGPS (06) 295 4888.

**Dissemination Media**

Publication: *Annual Bulletin on Private Sector Superannuation Funds and Approved Deposit Funds* (Cat. No. 90 2184 3) (\$4.95). These statistics are not currently available on electronic media.

**Broad Description**

Characteristics of superannuation funds and approved deposit funds (ADFs) - number of funds, membership, types of fund, financial information.

**Purpose of Data**

To provide information on the type, size, growth and financial aspects of superannuation funds and ADFs. Data are used for industry supervision, retirement income policy purposes, economic/financial management and funds management.

**Detailed Description  
*Population***

All private sector superannuation funds and ADFs that submit an annual return to the ISC for supervisory purposes.

**Superannuation Data  
Item**

Separate statistics are presented for superannuation funds and ADFs.

***Superannuation Data  
Items - continued***

For all superannuation funds, statistics are presented for number of funds and number of members classified by type of fund, industry, structure of retirement benefits, type of benefit provided and membership size.

For superannuation funds with assets that are not all individual insurance policies, statistics are presented for number of funds classified by earnings on investments and total investments size; number of funds and total investments by type of asset and total investments size, and by type of asset and type of fund; and number of funds and major income and expenditure items by type of fund.

For ADFs, statistics are presented for number of funds and number of depositors classified by total investments size; number of funds by earnings on investments and total investments size; and number of funds and type of asset by total investments size.

Values are recorded in thousands of dollars (\$'000).

The statistics show, for example, that for 1987-88 there were 89,760 superannuation funds whose assets were not all individual insurance policies and that these funds had total investments valued at \$39,717 million. 462 of these funds accounted for \$26,793 million, or 67 per cent, of these total investments. These 462 funds each had total investments over \$10 million.

Commencing 1988-89, statistics for Pooled Superannuation Trusts will be included. Commencing 1990-91, statistics for public sector superannuation funds will be included. Statistics on rollover balances and benefits payments are planned for publication in the second half of 1991. The form of this publication is undecided as yet.

<b>Source</b>	Compiled from information collected by the ISC through the Annual Returns for superannuation funds and ADFs. These are submitted by funds seeking compliance status under the Occupational Superannuation Standards Act. Complying funds receive concessional tax benefits.
<b>Method of Collection</b>	The statistics are an administrative by-product of the ISC's supervisory responsibility for the superannuation industry. Data are collected on forms completed by fund administrators. For 1987-88 some 120,000 funds submitted returns. The Australian Taxation Office (ATO) estimate that there were some 4,200 funds in 1988-89 that did not receive a tax concession. These funds, generally, would not have submitted an annual return to the ISC.
<b>Frequency</b>	Annual.
<b>Timeliness</b>	At present, statistics are published two and a half years after the period. Procedures are in place to improve the timeliness.
<b>Historical Data</b>	Data are available from 1986-87.
<b>Geographic Breakdown</b>	Statistics are published for Australia only. Statistics can be produced by postcode of address for correspondence, subject to confidentiality restrictions.
<b>Level of Confidentiality/ Availability</b>	Data relating to individual funds are protected under the Occupational Superannuation Standards Act and are therefore confidential.
<b>Unpublished Information</b>	Unpublished data may be available on request, subject to confidentiality restrictions.

<b>Name of Organisation</b>	Insurance and Superannuation Commission AAA Building, 212 Northbourne Avenue, Braddon ACT 2601  Telephone: (06) 247 2299 Fax: (06) 257 1639
<b>Contact</b> <i>About these statistics and to purchase statistics on floppy disk</i>	Robert Irwin Life Insurance Group, PO Box 178, Belconnen ACT 2616  Telephone: (06) 267 6802
<b>To purchase statistics</b>	Publications are available through Australian Government Publishing Service (AGPS) bookshops in each capital city. Mail orders through AGPS, GPO Box 84, Canberra ACT 2601. Phone shop through AGPS, on (008) 02 0049 for callers outside Canberra, and 295 4861 for local callers. Fax orders can be placed through AGPS (06) 295 4888.
<b>Dissemination Media</b>	Publications: <i>Quarterly Statistical Bulletin</i> (ISSN 0727-2871) (\$14.95), <i>Half Yearly Financial Bulletin on Life Insurance</i> (ISSN 0728-6864) (\$14.95) and <i>Insurance and Superannuation Commission Annual Report</i> (approximately \$18.00). The first two publications are also available on floppy disk at \$60.00 per disk.
<b>Broad Description</b>	Statistical and financial data contained in statutory returns received from life insurance companies.
<b>Purpose of Data</b>	To provide an up to date statistical summary of life insurance business as well as yearly financial and actuarial data.
<b>Detailed Description</b> <i>Population</i>	Australian registered life insurance companies and State government insurance offices.
<b>Superannuation Data</b> <i>Items</i>	Quarterly Bulletin contains number of policies, sums insured and their premiums at the beginning of quarter; business written in the quarter (same categories); discontinuances in the quarter (same categories plus causes for discontinuance, surrenders etc) and the balance

of superannuation business at the end of the quarter (ie business in force at end of quarter).

Half Yearly Bulletin contains income and expense as well as asset and liability data from end of year financial accounts and actuarial valuations received from life companies and State life offices.

The Annual Report contains data from the two above-mentioned publications.

<b>Source</b>	Sourced directly from statutory returns received from life insurance companies.
<b>Method of Collection</b>	Quarterly statutory returns are usually received by mail within six weeks of the end of the current quarter. Annual statutory returns are received by mail five and six months after the end of each company's financial year. Returns are received from some fifty-eight companies and four State offices.
<b>Frequency</b>	Quarterly and at the end of each company's financial year.
<b>Timeliness</b>	Generally, the Quarterly Bulletin is published four to six months after the end of the relevant quarter. The Half Yearly Bulletin is published about twelve months after the end of the each half year period. The Annual Report is usually published about eighteen months after the end of the financial year to which it relates.
<b>Historical Data</b>	Some superannuation data from 1962 onwards are obtainable from Annual Reports held in this Office. In addition, the Commission maintains a computerised superannuation data base commencing 1980.
<b>Geographic Breakdown</b>	<p>The Quarterly Bulletin provides a State by State breakdown of new annual and single premium superannuation business.</p> <p>The Half Yearly Bulletin and the Annual Report only provide data on an Australia-wide basis.</p>

**Level of  
Confidentiality/  
Availability**

There are no restrictions on access to superannuation data published in the above-mentioned ISC Life Group publications.

**Unpublished  
Information**

Currently there are no other unpublished life insurance superannuation data received by the ISC.

<b>Name of Organisation</b>	InTech Management Pty Limited Level 2, 99 Spring Street, Bondi Junction NSW 2022
	Telephone: (02) 369 2100 Fax: (02) 389 0609
<b>Contact</b> <i>About these statistics</i>	Mr Ron Lilling, Managing Director
<i>To purchase statistics</i>	Ms Caterina Piromalli, Survey Administrator
<b>Dissemination Media</b>	Publication: <i>Asset Allocation Monthly</i> (\$1,200.00 p.a. to participating fund managers and superannuation funds, \$2,400.00 p.a. to all other subscribers). An additional fee of \$300.00 p.a. applies if the publication is supplied on floppy disk.  These data are also available on a fund manager by fund manager basis as part of a wider package. The Intech Information Service offers individual fund resumes, performance analysis on Market Linked Pooled Funds Survey results, commentary by investment manager and risk-return graphs. This package costs \$1,500.00 p.a.
<b>Broad Description</b>	Asset allocation of superannuation funds.
<b>Purpose of Data</b>	To show where fund managers invest monies on behalf of clients.
<b>Detailed Description</b> <i>Population</i>	Corporate market-linked pooled superannuation funds.
<i>Superannuation Data</i> <i>Items</i>	Proportions invested in industrial shares, resource shares, direct property, listed property trusts, fixed interest, cash, off-shore shares off-shore fixed interest and off-shore cash.
<b>Source</b>	Collected by InTech from participating fund managers.
<b>Method of Collection</b>	Via standard forms supplied by fund managers.
<b>Frequency</b>	Monthly.



*Asset allocations of fund managers*

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Timeliness	Within 21 days of the reference period.
Historical Data	From 31 December 1985 on a quarterly basis. On a monthly basis from 31 December 1990.
Geographic Breakdown	Australia.
Level of Confidentiality/ Availability	Nil.
Unpublished Information	Not applicable.

<b>Name of Organisation</b>	InTech Management Pty Limited Level 2, 99 Spring Street, Bondi Junction NSW 2022  Telephone: (02) 369 2100 Fax: (02) 389 0609
<b>Contact</b> <i>About these statistics</i>	Mr Ron Liling, Managing Director
<i>To purchase statistics</i>	Ms Caterina Piromalli, Survey Administrator
<b>Dissemination Media</b>	Publication: <i>Intech Superannuation Survey of Market Linked Pooled Funds</i> (\$120.00 p.a.). For an additional fee of \$60.00 p.a., a faxed copy of the survey results will precede the mailed copy.  These data are also available on a fund manager by fund manager basis as part of a wider package. The Intech Information Service offers individual fund resumes, asset allocations, commentary by investment manager and risk-return graphs. This package costs \$1,500.00 p.a.
<b>Broad Description</b>	A performance survey of superannuation pooled funds offered by institutional fund managers.
<b>Purpose of Data</b>	To indicate historical rates of return earned by pooled fund managers over various durations.
<b>Detailed Description</b> <i>Population</i>	Corporate market-linked and capital stable pooled funds.
<b>Superannuation Data</b> <i>Items</i>	Rates of return over the following durations: 1 month, 3 months, 1 year, 3 years, 5 years and 7 years. Economic commentary; risk-return analysis (including graphs), pooled fund sizes and total funds under management figures for all fund managers. For example, "Maple Brown's rate of return for the 3 months ending 31 March 1991 of 12.1 per cent ranked 1st out of 37 managers".

*Survey of market linked pooled funds*

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Source	Collected by InTech from the participating fund managers. Checked by InTech for compliance.
Method of Collection	Standardised monthly forms.
Frequency	Monthly.
Timeliness	Within 15-20 days after the reference period.
Historical Data	Period covers history since 31 December 1983.
Geographic Breakdown	Australia.
Level of Confidentiality/ Availability	Nil.
Unpublished Information	Not applicable.

<b>Name of Organisation</b>	Life Insurance Federation of Australia 31 Queen Street, Melbourne Vic 3000  Telephone: (03) 629 5751 Fax: (03) 614 3074
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Darren Davis, Assistant Manager, Operations
<b>Dissemination Media</b>	Publication: <i>Australian Life Insurance Business During the 1980's</i> (Free publication).
<b>Broad Description</b>	Summary of information from ISC statistical reports.
<b>Purpose of Data</b>	To provide summary statistical data on various aspects of the Life Insurance industry for the decade 1970 to 1980, in a form which is easily understood. The publication is produced as a service to members and other interested parties.
<b>Detailed Description</b> <i>Population</i>	Refer to source documents.
<i>Superannuation Data Items</i>	Growth of superannuation business as measured by number of policies, single premium and annual premium, and sum insured for policies remaining in force. Premiums written and discontinued for superannuation business. Revenue and expenditure relating to superannuation business. Forfeitures and surrenders relating to superannuation business.
<b>Source</b>	ISC statistical reports.
<b>Method of Collection</b>	All information is collated from ISC reports covering the 10 year period.
<b>Frequency</b>	Once off publication.
<b>Timeliness</b>	Not applicable.
<b>Historical Data</b>	Not applicable.
<b>Geographic Breakdown</b>	Australia.

Level of  
Confidentiality/  
Availability

Not applicable, compiled from published data.

Unpublished  
Information

Not applicable.

<b>Name of Organisation</b>	Mintel Australia Level 4, 14 Collins Street, Melbourne Vic 3000  Telephone: (03) 654 4266 Fax: (03) 650 7730
<b>Contact</b> <i>About these statistics</i>	Research Director
<i>To purchase statistics</i>	Mr Simon Blyth, Marketing Manager
<b>Dissemination Media</b>	Publication: <i>Superannuation</i> (a Mintel Economic Management Report)(\$6,000.00). This is also available on floppy disk (Unix or IBM compatible). Data base facilities are also available (raw data access). Prices for these two products are available on application.
<b>Broad Description</b>	Primary research of fund managers. Secondary research of schedules and company records.
<b>Purpose of Data</b>	As base for industry intelligence and industry and competitor viability assessment and forecasts.
<b>Detailed Description</b> <i>Population</i>	Superannuation fund managers, including the managers of the superannuation funds of the top 100 companies, managers representing 95 per cent of public sector superannuation funds and managers of all major institutional funds.
<i>Superannuation Data Items</i>	The report provides an analysis of the superannuation industry, superannuation products (eg. personal superannuation, industry superannuation), product distribution and performance, market analysis and analysis of future growth.
<b>Source</b>	Major reliance is placed on primary research undertaken by Mintel. Secondary research and international research are also used.
<b>Method of Collection</b>	Several methodologies are used. These are delphi studies of industry participants, field collection of manager material. 95 per cent of public sector population are interviewed and

	100 companies are canvassed to represent the private sector.
Frequency	Annual since 1981.
Timeliness	Approximately 12 months after the reference period.
Historical Data	10 years.
Geographic Breakdown	Australia, selected analysis by region.
Level of Confidentiality/ Availability	Readily available on subscription.
Unpublished Information	Access to raw data can be obtained (price on application).

<b>Name of Organisation</b>	Rice Kachor Research 214 Belmore Road (South), Riverwood NSW 2210  Telephone: (02) 533 1388 Fax: (02) 533 4426
<b>Contact</b> <i>About these statistics</i>	Michael Rice, Executive Director PO Box 277, Riverwood NSW 2210
<i>To purchase statistics</i>	Dianne Swanlund, Secretary
<b>Dissemination Media</b>	Publications: <i>Analysis</i> (\$895.00 p.a.); <i>Analysis by State and Territory</i> (\$2,195.00 p.a. or \$1,195.00 issue by issue); <i>Asset Analysis</i> (\$2,595.00 p.a.); <i>Master Trusts Survey</i> (\$1,795.00 p.a.); <i>Investment Account Analysis</i> (\$1,695.00 p.a.).
<b>Broad Description</b>	Various reports analyse market share of life insurance companies, asset allocation of life insurance statutory funds and comparison of products available to the public (personal superannuation, superannuation master trust, industry funds).
<b>Purpose of Data</b>	Specialist research targeted towards practitioners in each field.
<b>Detailed Description</b> <i>Population</i>	All life insurance companies which submit a return to the Insurance and Superannuation Commission. Major fund managers offering specified products to the public (regular premium personal superannuation or savings plans, superannuation master trusts).
<i>Superannuation Data Items</i>	Analysis and Analysis by State contain details of market share of life insurance companies, premium income (annual premium and single premium basis), asset size and number of funds, at the national level and state level in the respective publications.  Asset Analysis contains details of asset allocations of statutory funds of life insurance companies.



Master Trusts Survey contains details of 48 master trust products, being all those issued by life insurance companies and the major master trusts issued by prospectus. The survey provides analysis on a product by product basis, comparison of fees and charges, market share analysis and overview of the market as a whole.

Investment Account Analysis contains comparative details of 30 to 40 regular premium personal superannuation and regular premium savings plans.

<b>Source</b>	Source material includes ISC statistics, policy documents, prospectuses, responses to questionnaires.
<b>Method of Collection</b>	Data are collected from several sources. Statistical publications and product surveys all contain information about the whole market. Samples are not used.
<b>Frequency</b>	Quarterly or annually (varies by publication).
<b>Timeliness</b>	Material is usually issued within four months of end of period.
<b>Historical Data</b>	Varies by product but some data are available for an eight-year period.
<b>Geographic Breakdown</b>	This information is provided when known at State or Territory level.
<b>Level of Confidentiality/ Availability</b>	Readily available on subscription.
<b>Unpublished Information</b>	Can be made available on a fee-for-service basis.

Name of Organisation	Plan for Life Pty Ltd (Simon Solomon & Associates) 8 Birch Street, Mt Waverley Vic 3149  Telephone: (03) 807 7482 Fax: (03) 807 8160
Contact <i>About these statistics and to purchase statistics</i>	Simon Solomon, Managing Director
Dissemination Media	Publication (\$175.00 per issue).
Broad Description	Data on immediate annuities.
Purpose of Data	Statistics are used as a reference manual for examining the different products sold by Australian Life Insurance companies and monitoring sale of immediate annuities each quarter.
Detailed Description <i>Population</i>	Immediate annuity products and quarterly sales of business by number of cases and dollar amounts. Total market covered.
<i>Superannuation Data Items</i>	Compilation of Australian immediate annuity products and quarterly sales, by company (million dollar units).
Source	Collected directly by Simon Solomon & Associates.
Method of Collection	Complete enumeration.
Frequency	Quarterly.
Timeliness	Within three months of the reference period.
Historical Data	Part of 1989, 1990 and 1991.
Geographic Breakdown	Australia.
Level of Confidentiality/ Availability	Not applicable.
Unpublished Information	Specific reports and analyses available on request.

<b>Name of Organisation</b>	TPF & C, A Towers Perrin Company Level 15, MLC Centre, Martin Place Sydney NSW 2000  Telephone: (02) 229 5111 Fax: (02) 221 4505
<b>Contact</b> <i>About these statistics</i>	Robert Lipman, Manager, Financial Planning GPO Box 3279, Sydney NSW 2001  Telephone: (02) 229 5421
<i>To purchase statistics</i>	Michael Apostolou  Telephone: (02) 221 5282
<b>Dissemination Media</b>	Publication: TPF & C <i>ADF/Annuity League Table</i> (\$18.00 p.a. for 6 editions).
<b>Broad Description</b>	Survey of rollover funds (i.e. Approved Deposit Funds (ADFs), Deferred Annuity Funds (DAFs) and Immediate Annuities (iAs)).
<b>Purpose of Data</b>	To provide data on rollover funds to interested parties.
<b>Detailed Description</b> <i>Population</i>	Sixty-eight fund managers offering either approved deposit funds, deferred annuities, complying and non-complying immediate annuities for a purchase price of \$100,000.00.
<i>Superannuation Data</i> <i>Items</i>	Individual managers underwriting ADFs, DAFs and IAs. ADFs and DAFs: fund sizes, yields on \$10,000.00 for 1,2 and 3 years, fees (entry, exit and annual), whether funds are unit linked and/or capital guaranteed, minimum investment and withdrawal and availability of preservation facilities. IAs: summary or returns on investments and market information, such as number sold and in force, purchase price and fund sizes.
<b>Source</b>	As provided by fund managers to TPF & C.

Method of Collection	Managers forward data as at a specified date. There are currently 68 managers and 296 products in the table.
Frequency	Bi-monthly.
Timeliness	Few days after the closing of the month to be tabled.
Historical Data	Data available since February 1985.
Geographic Breakdown	Australia-wide.
Level of Confidentiality/ Availability	Data readily available as published, on subscription.
Unpublished Information	No further data are available from TPF & C. Any other data would have to be obtained directly from the managers of the funds represented in the table.

<b>Name of Organisation</b>	William M Mercer Campbell Cook & Knight 401 Collins Street, Melbourne Vic 3000
	Telephone: (03) 617 5454 Fax: (03) 614 1936
<b>Contact</b> <i>About these statistics and to purchase statistics</i>	Ms Betty Ryan, Survey Manager Investment Department
<b>Dissemination Media</b>	Floppy disk (price on application).
<b>Broad Description</b>	Investment returns of pooled superannuation funds.
<b>Purpose of Data</b>	The data are used for monitoring performance of fund managers.
<b>Detailed Description</b> <i>Population</i>	There are 38 fund managers included in the survey. The managers included are those involved in the wholesale segment of the industry, and must have at least 3 years of investment performance history.
<b>Superannuation Data</b> <i>Items</i>	The data are investment returns (net of tax, but before management fees or redemption fees) achieved by each manager included in the table over four periods, being 3 months, 1 year, 3 years and 5 years.
<b>Source</b>	Source data (in terms of unit prices) are collected directly from the fund managers.
<b>Method of Collection</b>	Unit prices are sent to Mercer Campbell Cook & Knight at the end of each month by fund managers included in the survey. The survey covers all significant fund managers in the industry.
<b>Frequency</b>	The survey is conducted monthly.
<b>Timeliness</b>	Results are available about three weeks after the end of the survey month.
<b>Historical Data</b>	We have data back to January 1971.

**Geographic  
Breakdown**

Not applicable.

**Level of  
Confidentiality/  
Availability**

Not applicable. The *Mercer Pooled Fund Survey* is published in the *Business Review Weekly* every month.

**Unpublished  
Information**

Available on request.

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